

# How to Use the MTW Supplement Module (PHA Users)

## **Contents:**

<b><i>Overview.....</i></b>	<b><i>2</i></b>
<b><i>System Requirements .....</i></b>	<b><i>2</i></b>
<b><i>Document Update Information .....</i></b>	<b><i>3</i></b>
<b><i>DO THESE FIRST – Items to Review Before You Create the MTW Supplement in the System ....</i></b>	<b><i>6</i></b>
Documents to Review .....	6
Documents to Gather .....	6
Notes to Review .....	6
<b><i>Helpful Information and Tips .....</i></b>	<b><i>8</i></b>
Known System Issues .....	8
Accessing the System .....	8
Navigation .....	9
Saving Data .....	9
Revising a Submitted Form .....	10
Email Notifications .....	10
<b><i>Creating a New MTW Supplement Form .....</i></b>	<b><i>10</i></b>
<b><i>Accessing an Existing MTW Supplement Form.....</i></b>	<b><i>12</i></b>
<b><i>Tips for Entering Information in the Form .....</i></b>	<b><i>14</i></b>
Field Types.....	14
File Uploads .....	14
<b><i>Working with File Attachments.....</i></b>	<b><i>15</i></b>
Important Information about Working with Files .....	15
File Validations in the System .....	15
Uploading Files.....	16
Note about Hardship Policy and Impact Analysis File Uploads.....	16
Upload a New Document.....	16
Uploading Documents with Additional Information.....	18

<b>Delete an Existing File.....</b>	<b>19</b>
Note about Section D, Safe Harbor Waivers, and Section E, Agency-Specific Waivers .....	19
Method 1 – Deleting from Where it was Uploaded in the Form (Recommended) .....	20
Method 2 – From the Related Tab.....	20
<b><i>Deleting a Draft Form .....</i></b>	<b>22</b>
<b><i>Submitting the MTW Supplement .....</i></b>	<b>23</b>
<b><i>Revising a MTW Supplement Form that’s Not Approved .....</i></b>	<b>24</b>
Revise an Uploaded Document .....	24
Remove a Previously Selected Activity .....	24
<b><i>Amending an Approved Form .....</i></b>	<b>26</b>
<b><i>Downloading a PDF of the Form .....</i></b>	<b>29</b>
<b><i>Downloading Uploaded Files .....</i></b>	<b>32</b>
<b><i>Technical Assistance .....</i></b>	<b>34</b>
General Tips for Getting Assistance.....	34
What to Include in Email Requests.....	34
<b><i>Appendix: Checking your Default Web Browser.....</i></b>	<b>35</b>

## Overview

The purpose of this document is to help PHAs with how to use the MTW Supplement module within the Housing Information Portal (HIP). The MTW Supplement module contains the [HUD-50075 MTW, MTW Supplement to the Annual PHA Plan](#), form that is used by MTW Expansion PHAs. While HIP is built on the Salesforce platform and you will see references to it at times, it is a custom application, so you should refer to it as HIP, not Salesforce.

**Please read this document before attempting to do any work in the HIP MTW Supplement module.**

## System Requirements

Users **must** use a web browser other than Internet Explorer, such as Google Chrome, Microsoft Edge, or Safari, to access this system. **Internet Explorer is not supported.** If you are unsure what your default web browser is, use the instructions in the [Appendix: Checking your Default Web Browser](#).

## Document Update Information

The information below will provide users with details on what has changed in this document over time. If it has been a little bit since you viewed the document, this will help you know what may have changed.

Items Updated	Date Updated
<ul style="list-style-type: none"> <li>Updated the <a href="#">Accessing the System</a> section with additional information about passwords.</li> </ul>	10/06/2023
<ul style="list-style-type: none"> <li>Clarifications in the <a href="#">Important Information about Working with Files</a> and <a href="#">Uploading Documents with Additional Information</a> sections.</li> </ul>	09/26/2023
<ul style="list-style-type: none"> <li>General look of the document was updated, and wording tweaked as necessary to incorporate the template being used for all HIP training materials.</li> <li>Added information about deleting files from sections D and E.</li> <li>Other clarifications based on user feedback.</li> </ul>	03/14/2023
<ul style="list-style-type: none"> <li>Updated the name of the document on the title page and other areas of the document as needed to reflect that MTW Supplement is a module within the Housing Information Portal (HIP).</li> </ul>	03/02/2023
<ul style="list-style-type: none"> <li>Updated the link (URL) for the login page from <a href="https://hud-gateway.force.com/hip">https://hud-gateway.force.com/hip</a> to <a href="https://hud.my.site.com/hip">https://hud.my.site.com/hip</a>. Users will continue to use their existing user ID and password. This is only a change to the URL. Any references to the login page in this document have been updated. If a user has bookmarked the login page link, they should update their bookmark at this time.</li> <li>Updates to the <a href="#">Working with File Attachments</a> section. <i>Please review this information prior to attempting to upload any files.</i></li> <li>Added section for how to delete a draft file.</li> <li>Added section for amendments to approved (final) submissions.</li> <li>Correction to the creating an amendment section.</li> <li>Other updates as needed to clarify content.</li> </ul>	02/13/2023
<ul style="list-style-type: none"> <li>Updated the link (URL) for the login page.</li> <li>Information about storing of a user's password in their web browser was added to the <a href="#">Helpful Information and Tips → Accessing the System</a> section</li> </ul>	07/12/2022
<ul style="list-style-type: none"> <li>Clarified the instructions under <a href="#">Downloading a PDF of the Form</a> to emphasize that users should give the system time to generate the file before attempting to open it.</li> <li>Made several updates to the information for uploading and deleting files and have split the previous Uploading and Deleting Files section into two separate sections.</li> </ul>	05/24/2022

Items Updated	Date Updated
<ul style="list-style-type: none"> <li>Added information to the <a href="#">Before You Create the MTW Supplement in the System</a> section to help PHAs prepare their MTW Supplement prior to going into the system.</li> </ul>	05/16/2022 & 05/24/2022
<ul style="list-style-type: none"> <li>Added additional information about the character limits in text boxes to the <a href="#">Field Types</a> section.</li> </ul>	05/03/2022
<ul style="list-style-type: none"> <li>Added a note about the known issues list to the sections about creating and accessing a form.</li> <li>Clarified the information about when passwords expire.</li> <li>Updated the <a href="#">Before You Create the MTW Supplement Online→Notes to Review</a> section to reflect all typographical corrections that have been made in the online system.</li> </ul>	04/15/2022
<ul style="list-style-type: none"> <li>Updated the <a href="#">Email Notifications</a> section with the updated list of statuses that generate automatic email notifications.</li> </ul>	03/14/2022
<ul style="list-style-type: none"> <li>Updated the <a href="#">Uploading and Deleting Files</a> section to further clarify the process for updating a document if HUD requests changes. Also clarified the information about deleting previously uploaded files.</li> </ul>	03/08/2022
<ul style="list-style-type: none"> <li>Moved the <a href="#">Helpful Information and Tips</a> section toward the front of the document so that users can reference it prior to starting to work in the system.</li> <li>Clarified in the <a href="#">Uploading and Deleting Files</a> section that files should not be uploaded under the Related tab within a form.</li> <li>Added information about time needed to generate larger PDF files to the <a href="#">Downloading a PDF of the Form</a> section.</li> </ul>	02/02/2022 & 02/17/2022
<ul style="list-style-type: none"> <li>Added two items under the <a href="#">Before You Create the MTW Supplement in the System→Notes to Review</a> section.</li> <li>Added additional information to the <a href="#">Deleting an Existing File</a> section.</li> <li>Added the Revising a Submitted Form section.</li> </ul>	01/11/2022
<ul style="list-style-type: none"> <li>Clarified various text in the document.</li> <li>Added additional details to the <a href="#">Technical Assistance</a> section for what to include when emailing the REAC TAC.</li> </ul>	12/13/2021
<ul style="list-style-type: none"> <li>The <a href="#">Email Notifications</a> section has been updated to reflect the updated list of who receives the email notifications.</li> <li>The <a href="#">Technical Assistance</a> section has been updated to provide some additional details on how to get assistance with the system.</li> <li>The <a href="#">Appendix: Checking your Default Web Browser</a> section has been updated to clarify some of the information.</li> <li>Clarified role of Salesforce in the introduction on page 2.</li> </ul>	11/30/2021

Items Updated	Date Updated
<ul style="list-style-type: none"> <li>The information under the first bullet in the <a href="#">Before You Create the MTW Supplement in the System→Notes to Review</a> section has been clarified as to how the web-based form has been updated from what is contained on the OMB approved form.</li> </ul>	09/28/2021
<ul style="list-style-type: none"> <li>The link (URL) for the login page.</li> </ul>	09/03/2021
<ul style="list-style-type: none"> <li>Added a sub section with information about how to view a list of known issues to the <a href="#">Helpful Information and Tips</a> section.</li> <li>Clarified the information about entering a File Description when uploading a file and when it is done.</li> <li>Clarifications to wording in various locations within the document to assist with understanding.</li> </ul>	08/12/2021

## DO THESE FIRST – Items to Review Before You Create the MTW Supplement in the System

Prior to creating your MTW Supplement to the Annual PHA Plan in the web-based system, you should ensure that you have reviewed the following documents, gathered documents you will need to upload, and read the notes to review listed below.

Since the HIP MTW Supplement module is not meant to be a planning tool, you should not go into the system until you are ready to fill in the web-based form. You should reference the OMB approved MTW Supplement form to know what you will be asked to respond to and then you can use Microsoft Word to draft your responses, especially blocks of text, in a document on your computer. This will allow you to collaborate on your responses with other members of your PHA's staff prior to going into the system as well. Once you know what your responses will be, you can go into the system to create your form.

### Documents to Review

- The MTW Operations Notice
  - The [official version](#)
  - The reader-friendly version – [Sections I-V](#) and [Section VI](#)
- The selection notice for your cohort – this can be found by going to your cohort's page on the [MTW Expansion page](#).
- The [MTW Supplement to the Annual PHA Plan](#) form (OMB approved form)
- This document
- The MTW Supplement related guidance and trainings on the [MTW Supplement web page](#) under Guidance and Trainings.
- The video that contains a demo of the online system on the [HIP Training page](#).

### Documents to Gather

- Know the location on your computer of any documentation related to hardship policy, impact analysis, Safe Harbor Waivers, and Agency-Specific Waivers.
- Know the location on your computer for the documents you will need to upload for Section H, Public Comments.
- Ensure that the MTW Certifications of Compliance found in the above linked MTW Supplement form is signed and scanned.

### Notes to Review

- View the MTW Supplement module trainings, including the system demo, prior to starting a form in the system. Links to the trainings can be found on the [HIP Training page](#).

- Review the list of known system issues on the [HIP Training page](#) prior to starting a new form. This can help prevent some of the issues that could occur.
- There have been some typographical corrections made in the web-based form, listed below, that are not contained in the form linked above that you should keep in mind as you are developing your MTW Supplement.
  - Under Section C.17, Local, Non-Traditional (LNT) Activities, in the tables for 17.c, the AMI percentages have been corrected to be 30%, 50%, and 80%.
  - In Section G.2, Establishing Reasonable Rent Policy, the follow-up question “Please describe the MTW agency’s plans for its future rent reform activity and the implementation timeline” the OMB approved form states that this question is asked if the PHA answers Yes when in fact it should be No. The web-based form has been updated to reflect that you only need to respond to this follow-up question if you answer No.
  - In Section I, Evaluations, the question has been clarified to read "Does the MTW agency have any evaluations of its agency or policies?" in the web-based form.

## Helpful Information and Tips

The information in this section will assist users as they use the system to complete the MTW Supplement form submission.

### Known System Issues

A list of the issues known to exist in the HIP MTW Supplement module are contained in a document on the [HIP Training page](#) and will be updated as needed. Please look at this document prior to reporting any issues.

### Accessing the System

- Login page: <https://hud.my.site.com/hip>
  - Do not reuse the link that you previously received in your initial account activation email, or any password reset emails since those are one time use links.
- You **must** use a web browser other than Internet Explorer (IE), such as Google Chrome, Microsoft Edge (current version, not legacy), or Safari. Information on how to determine what your default browser is can be found [in the appendix](#) of this document, which is especially important as you access links in this document or the email to setup your account password.
  - To make sure you don't have the legacy version of Edge, go to Settings and More→Settings→About Microsoft Edge. The legacy version will have a version number of 44 or less.
- Passwords:
  - Passwords must be changed every 60 days and expire after 90 days. You will be prompted to update your password when it has expired. *Note that at some point in the future the feature that makes accounts inactive after 90 days may be turned on, so users should access the system at least once every 90 days.*
  - After three failed attempts, your account will be locked for 60 minutes. Password resets will not work during these 60 minutes. It is suggested that you attempt a password reset if you need one after the second failed attempt.
  - When you do a password reset, you will use your username that you use to login the system.
- If a user is prompted by their web browser to store their password, it is highly recommended that they select No. This will help to practice good security but will also prevent issues when a user changes their password or if there is a change in login page URL.
- To log out of the system when you are finished with your session, click on the icon in the upper right-hand corner of the page and then click on Logout.



## Navigation

- Housing Information Portal (HIP) landing page (sometimes referred to as the community portal):
  - Account Profile – this is where you can update your email address if it changes. For the password reset function to work or the automatic email notifications if you are the user that submits a form, you need to make sure to keep this up to date.
  - Create New MTW Supplement Form – this is where a new form is created. Do not select this if you want to continue with a previously created form.
  - Open Existing MTW Supplement Forms – this is where you can access forms that were previously created by you or another user in your PHA. Once a form is accessed, you can view it or, depending on the current status of the form, edit it. You can also check the status of a previously created form.
- Due to the amount of data to be displayed, **you should pause for at least 15 seconds after each page loads** to allow the pick list and previously entered values to load. If you click on a pick list to make a selection without doing this, the list will be blank. Depending on the page, you may see an indication on the screen that the page is working on loading.
- Do **not** use the Back, Forward, or Refresh buttons in your web browser. When working in a form, use the Next and Previous buttons to navigate between pages of the form. You will not see a Previous button on every page in Section C due to the complexity of the data in this section.
- If you have navigated away from the MTWS Form Submission page, for example to the Files page, and need to get back to it, on some pages there may be a breadcrumb in the upper left-hand corner to get back to it, like the one pictured below, that will contain the form number. **If you do not see this breadcrumb, you can use the Home button in the upper left-hand corner of the page. From there you can open your existing form or do other tasks.**

MTWS Form Submissions > MTWS Form - 00059

## Saving Data

- In sections of the form other than Section C, using the Next or Previous buttons while working in a form will save what you have entered on that page.
- In Section C, for the information to be saved you must navigate through both the core questions and custom questions for a specific activity and get to the next activity you selected in the Section C screener. If you were already on your last activity when you clicked Next, the information for that last activity will be saved when you are shown the

page for Section D. If you exit the form or system before navigating past the custom questions page for an activity, your information will not be saved.

### Revising a Submitted Form

As mentioned earlier in this document, once a form is submitted it can only be opened in a read only version. Only the MTW office, not the local field office, can return a form for revisions. The local field office will work with the MTW office to return a form in the system so that it can be edited again. This is typically done if revisions are needed after HUD's review has been completed, but if you have a reason that it needs to be done prior to this, communicate this to your point of contact in your local field office.

### Email Notifications

The system will generate automatic email notifications when the status of an MTW Supplement form changes in the system. Those messages will be sent to the user at the PHA that submitted the form, the MTW Supplement mailbox, the MTW office desk officer, and the field office point of contact (POC). At this time, we cannot add other contacts to the system. The notifications will be sent when:

- The form is submitted by the PHA.
- The MTW office has changed the status of the form to Returned for Revision.
- The MTW office has changed the status of the form to Conditional Approval.
- The MTW office has changed the status of the form to Final.

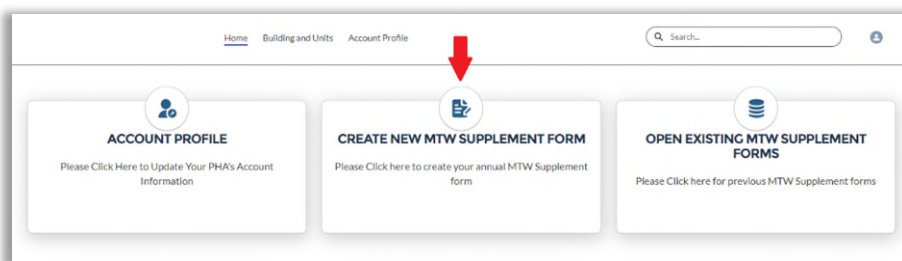
### Creating a New MTW Supplement Form

The steps below will guide you through creating a new MTW Supplement form. If you or another user assigned to your PHA previously started a form and wish to continue working on it, you can open it using the [Accessing an Existing MTW Supplement Form](#) section of this document.

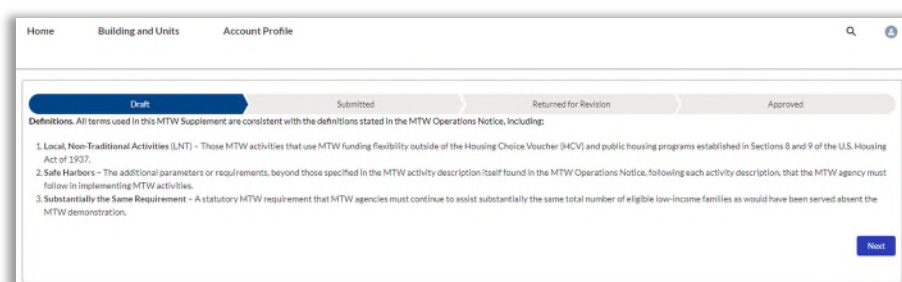
**Note:** You must use a web browser other than Internet Explorer (IE). If you are not sure which browser is your default, you can check using the instructions [in the appendix](#) of this document.

**Users should look at the known issues list on the [HIP Training page](#) prior to creating a new form. This will help prevent some issues and will provide workarounds for others.**

1. If you are not already logged into the system, login by going to <https://hud.my.site.com/hip> and entering your user ID and password.
2. On the home page, click on the tile labeled Create New MTW Supplement Form. *The tiles that you see on this page will be dependent on the areas of the Housing Information Portal (HIP), which includes the MTW Supplement, that you have access to.*



3. You will see the introduction page of the MTW Supplement. After you review the definitions on this page, which are taken from the [MTW Supplement to the Annual PHA Plan](#) (HUD-50075-MTW), click on the Next button to proceed.



4. You will be taken to the page that contains Section A, PHA Information, and Section B, Narrative. Most of the Section A, PHA Information, information is prepopulated, but you will need to complete the Supplement Fiscal Year and MTW Supplement Submission Type (see notes below). You will also need to enter your narrative in Section B.
  - The Supplement Fiscal Year should correspond to your Fiscal Year Beginning (FYB). For example, if your submission is for FYB 07/01/2023 you will see the month and year prepopulated under MTW Supplement for PHA Fiscal Year Beginning and you will select 2023 in the Supplement Fiscal Year drop-down box. The year **does not** correspond to the fiscal year (FY) you are doing the form for, e.g., a form for FYB 07/01/2023 would be for FY 2024.
  - The submission type will be Annual Submission.
  - You will only select Amended Annual Submission if you are amending a previously approved MTW Supplement that has the status of Final in the system. See [Amending an Approved Form](#) for more information about this process.
5. When you have completed these entries, click on the Next button to save your entries, and continue with the form. **If you do not click the Next button on this page, your form will not be created!**

You can reference the [Tips for Entering Information in the Form](#) and [Helpful Information and Tips](#) sections of this document for additional information on how to use the system and enter information in the various fields.

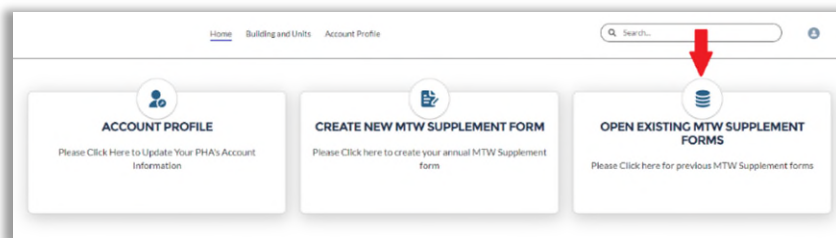
## Accessing an Existing MTW Supplement Form

The instructions below will assist you to continue to work with a form you have not yet submitted, revise a form that has been returned for revisions, or view a form. You can open an existing form that was created by another user that is/was assigned to your PHA.

**Note:** You must use a web browser other than Internet Explorer (IE). If you are not sure which browser is your default, you can check using the instructions [in the appendix](#) of this document.

**Users should look at the known issues list on the [MTW Supplement web page](#) prior to working a form. This will help prevent some issues and will provide workarounds for others.**

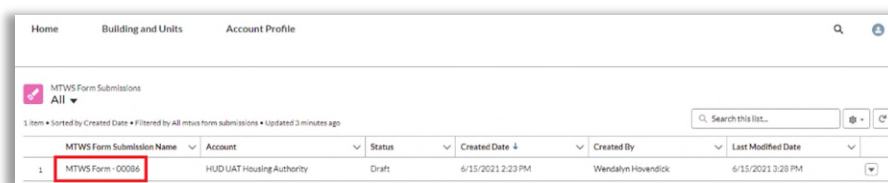
1. If you are not already logged into the system, login by going to <https://hud.my.site.com/hip> and entering your user ID and password.
2. On the home page, click on the tile labeled Open Existing MTW Supplement Forms. *The tiles that you see on this page will be dependent on the areas of the Housing Information Portal (HIP), which includes the MTW Supplement, that you have access to.*



3. On the Previous Supplement Submissions page, look for the form number associated with the form you wish to open under the MTWS Form Submission Name column and click on it to open it. Once the form opens, you can enter or edit information, or for forms that are submitted or approved you can view a read only version of the form.
  - If you do not see any forms listed or do not see the one you are looking for, under the MTWS Form Submissions heading click on the arrow to the right of the words Recently Viewed to open a drop-down box and select the All option.



The All view is what will show you the status, Created Date, Created By, and Last Modified Date columns that will also assist in determining the form you wish to open.



	MTWS Form Submission Name	Account	Status	Created Date	Created By	Last Modified Date
1	MTWS Form - 00096	HUD UAT Housing Authority	Draft	6/15/2021 2:23 PM	Wendalyn Hovendick	6/15/2021 3:28 PM

## Tips for Entering Information in the Form

This section will provide some information about how to enter information into the MTW Supplement web-based form. The information will be broken down into field types and file uploads.

### Field Types

There are two main types of fields in the form:

1. Text boxes – allow entry of text and/or numbers, as applicable.
  - You can copy and paste into a text box from another document, but it will not retain the formatting as you see it in the source document. Text boxes are plain text only. However, items like bullets and the tab character will appear and will count towards the character limit.
  - The number of characters accepted in a text box is dictated by the question. Text boxes that allow for larger blocks of text will show the first five lines of text and allow for 5,000 characters. If you need to view text that is not visible, you can use the arrow keys on your keyboard or the scroll bar on the text box. The exceptions to the 5,000-character limit for larger text boxes are the Section B Narrative, which allows for 10,000 characters, and the text box that appears if you select “Other” under “Population Type” in the table in Section G.3, which allows for 1,000 characters. You can use <https://www.charactercountonline.com/> to check the number of characters in a block of text. *Note that this website is not endorsed by HUD but is given as a resource since it accounts for the characters that the web-based form will count as characters.*
2. Picklists – Some pick lists only allow the user to select one item, while others allow multiple items to be selected.
  - Pick lists that only allow one selection are commonly referred to as drop-down lists. Generally, these lists have “--Select--” at the top of the list.
  - Pick lists that allow multiple selections will place a checkmark to the left of a selection when you click on it. To select multiple items, simply find them in the list and single click on each one. To close the pick list, click on a blank area (white space) outside of the pick list.
    - Sometimes, if there is a long list of selections, you may also see a text box to filter or search for a specific entry.

### File Uploads

Please reference the information in the [Working with File Attachments](#) section of this document for all of the information about tips for working with files, uploading files, revising files, and deleting files.

## Working with File Attachments

One of the ways that HUD obtains information from PHAs as part of their MTW Supplement form is through files that are attached to the form. It is imperative that users read and follow the instructions in this document to ensure that their submission contains the most recent version of each document and does not contain multiple copies of each file. When a form is approved, this will mean that the final version of a document is included as well.

### Important Information about Working with Files

Following the information provided below will assist both PHAs and HUD staff with working with files that are uploaded as part of an MTW Supplement form.

- Files should be named with the following naming convention. Do not include spaces and punctuation in file names.
  - **Naming convention:** PHA code, Fiscal Year (FY), and short name for the policy/item.
  - Some examples are listed below but the main thing is that the file name should not be long and should be clear about what the file contains:
    - CA789FY21RentHardship for a rent hardship policy
    - CA789FY21ImpactAnalysis for an impact analysis that is applicable to multiple MTW activities.
    - CA789FY21MTWCertofCompliance for the MTW Certifications of Compliance
- Upload one file at a time. If you upload multiple files at once, the upload will not be successful.
- You can upload PDF or Word documents. No other file types are accepted.
- The size limit for an individual file is 25 MB.
- Do not upload files directly under the Related tab unless it meets the criteria under the [Uploading Documents with Additional Information](#) section. If you upload a file using the instructions in this section instead of uploading a file within the applicable area of the form, they **will not** be connected to the specific area of the form that it pertains to, which is referred to as the “content type”. For example, the system will not know that the file you uploaded is a “hardship policy” if you do not upload it under the hardship policy question for an activity. A file uploaded under the hardship policy question is given the “hardship policy” content type. **Uploading files under the Related tab that need to be connected to a “content type” could also cause you to receive validation errors on the form.**

### File Validations in the System

Some of the areas in the system that ask for files to be uploaded will show you a validation error if you do not upload a file. Some examples are hardship policy, impact analysis, and Section D, Safe Harbor Waivers, and Section E, Agency-Specific Waivers, amongst others.

## Uploading Files

There are two ways to upload files into the MTW Supplement form – browse for the file on your computer or drag and drop. While there are a couple more steps in the “browse” method, this is the method that most users are used to from working with other websites and applications. Both will result in the file being uploaded if the user receives the confirmation message.

### *Note about Hardship Policy and Impact Analysis File Uploads*

If you upload a file under one activity and it is applicable to another activity you **must** keep the following in mind:

- In the picklist that asks if the activity requires a hardship policy or impact analysis, it will have the three options Yes, No, and Provided Already.
  - For the first activity the hardship policy or impact analysis is applicable to, you will answer Yes and answer any subsequent questions and upload your file. In the picklist that asks if it applies to more than this MTW activity, you will select each of the other activities that it applies to. You do not have to select the activity you are currently providing information for.
  - For the other activities that the hardship policy or impact analysis is applicable to that you selected in the picklist described above, you **must** select Provided Already or you will receive the validation message that asks you to upload a file. **You should not answer no to the question about if a hardship policy or impact analysis is required.**
  - You will not use the Provided Already response if you did not select the activity from the picklist described above in another activity.

### *Upload a New Document*

1. To upload a file, decide whether you want to browse for the file on your computer or drag and drop it into the system using the file explorer window. **Please ensure that your file name uses the naming convention described in the [File Uploads](#) section.**



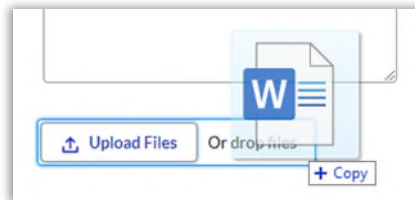
The screenshot shows a file upload interface. On the left, there is a file icon and the text "Hardship Policy(0)". On the right, there is a "Content Type" dropdown menu set to "Hardship Policy". Below that is a "File Description" text box. At the bottom right, there are two buttons: "Upload Files" (with a blue upload icon) and "Or drop files". These two buttons are enclosed in a red dashed rectangular box.

2. **Section E only, Agency Specific Waivers, only (other sections skip to the next step):** Enter a brief description of the file in the text box labeled File Description before you upload the file. The file description is what you will be used in future years for Section E.2. *You can leave the File Description blank in all other sections.*

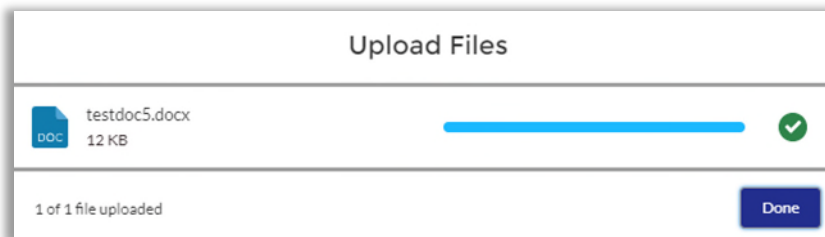


3. **Browse method:** Click on the Upload Files button. A new window will open. Use this window to browse for the location you have saved the file in. Single click on the file name once you locate it and click on the Open button (alternatively you can double click on the file name).

**Drag and drop method:** Open the file explorer window (in Windows use the Windows key plus E at the same time). Navigate to the location of the file. Click on the file name and while holding down the left mouse button drag it to your web browser window that has the HIP MTW Supplement module in it and let go of the mouse button once you see a blue box appear around the area where it says, "Upload Files or drop files".



4. Once you have either browsed for the file and dragged and dropped it, you will see a message titled Upload Files and shows you the progress of the upload. Once the upload is complete, it will show a green circle with a checkmark. Click on the Done button to go back to your form.



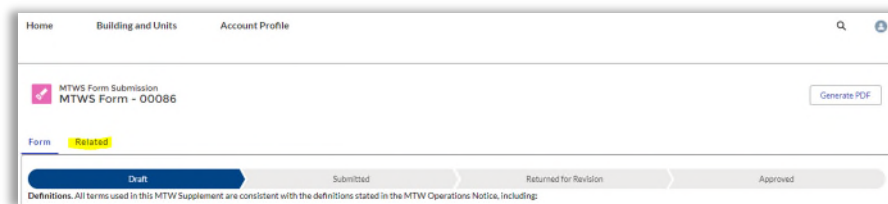
5. The area of the page will refresh and will show your file has been uploaded. If you need to upload additional files, repeat the steps in this section.



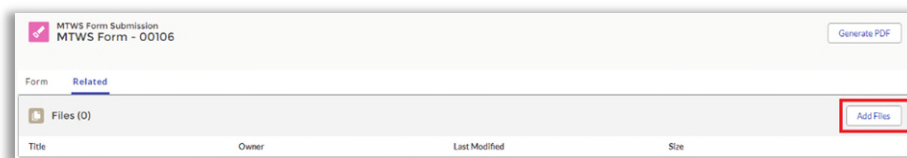
### Uploading Documents with Additional Information

There could be times when you want to provide additional information that was not specifically requested on the MTW Supplement form. **Only in these cases will you use the instructions below.** If you upload a file using these instructions instead of uploading a file within the applicable area of the form, they will not be connected to the specific area of the form that it pertains to, which is referred to as the “content type”. For example, the system will not know that the file you uploaded is a “hardship policy” if you do not upload it under the hardship policy question for an activity. A file uploaded under the hardship policy question is given the “hardship policy” content type. **If you upload a file under the Related tab, you will **not** be able to connect it to a specific area of the form later.**

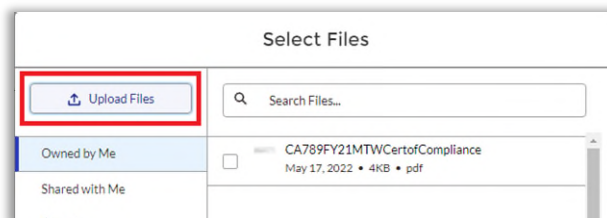
1. On the MTWS Form Submission page, on the left side of the page above the line that shows the status of the form, look for the tab (link) labeled Related and click on it.



2. The first section on the MTWS Form Submission page is the Files heading. On the same line as the Files heading is a button labeled “Add Files”, click on it.



3. At the top of the screen that appears, find the Upload Files button in the top left corner, and click on it. You’ll be presented a Browse window to find your file on your computer and upload it. **You must ensure to use the file naming convention listed in the [File Uploads](#) section so that HUD can identify what activity the file is for!**



4. After you have found the file on your computer and selected it for upload, the system will tell you when the upload has been completed. Click on the Done button to confirm the file has

been uploaded. The screen will disappear, and you will see your uploaded file in the Files list. Repeat this process for any additional files.

### Delete an Existing File

Some of the reasons that you may need to delete a file from your form are because you upload a file in error or HUD has asked you to revise a file. You may also need to delete a file if you revise the contents of the file so that you only have the most recent version in the system. Method 1 is the recommended method since most of the time users will need to upload a new version of the document after deleting the old version.

*If you are not already in the form, use the instructions in the [Accessing an Existing MTW Supplement Form](#) section of this document to open the form you wish to delete an existing file from.*

### *Note about Section D, Safe Harbor Waivers, and Section E, Agency-Specific Waivers*

If you upload a file for a Safe Harbor Waiver or Agency-Specific Waiver request and later need to remove all requests from that section (e.g., all your Agency-Specific Waiver requests), you will need to:

1. Use in the instructions in [Method 1](#) below to delete the file or files that were previously uploaded.
2. Change the response to the first question from Yes to No. **Failure to change the response to this question back to No will cause you to receive a validation error because the system will be looking for a file to be uploaded.**
  - Section D: Will the MTW agency submit request for approval of a Safe Harbor Waiver this year?
  - Section E: Will the MTW agency submit a request for approval of an Agency-Specific Waiver this year?

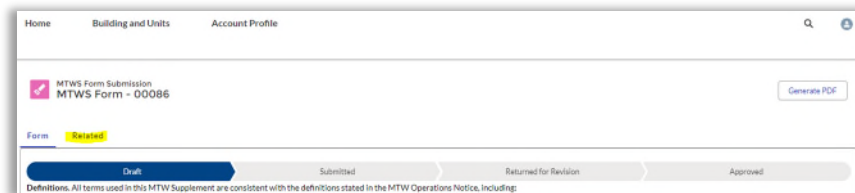
### *Method 1 – Deleting from Where it was Uploaded in the Form (Recommended)*

1. On the MTWS Form Submission page, navigate to the place in the form where you uploaded the file (e.g., a hardship policy for activity 1.c).
2. Below the Upload Files button and to the left, you will see the file you previously uploaded. To delete the file, click on the trash can icon. You will get a pop-up message that asks you to confirm that you want to delete the file. Click OK to confirm. The page will refresh, and you will no longer see the file.

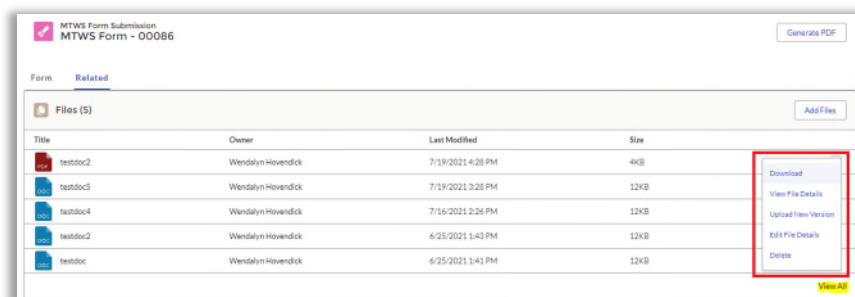


### *Method 2 – From the Related Tab*

1. On the MTWS Form Submission page, on the left side of the page above the line that shows the status of the form, look for the tab (link) labeled Related and click on it.



2. The first section on the MTWS Form Submission page is the Files heading. Next to the heading will be a number in parenthesis to tell you how many files have been uploaded to the system. To delete a file, find the file name in the list and single click on the down arrow on the right side of the line for that file. A menu will appear.
  - If you do not see the file you want to delete in the list, you can click the View All link that is found in the bottom right-hand corner of the section.



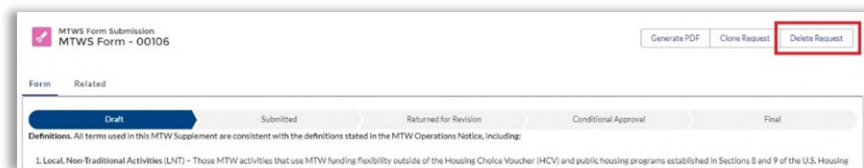
3. Click on the Delete option to delete the file. A Delete File confirmation message will appear. Click on the Delete button to confirm deletion of the file.

Delete File?
Deleting a file also removes it from any records or posts it's attached to.
<div><input type="button" value="Cancel"/> <input type="button" value="Delete"/></div>

## Deleting a Draft Form

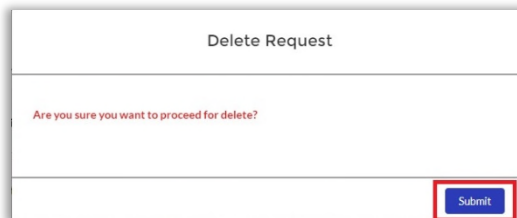
If a user creates a new form in error or the PHA no longer needs a form, it can be deleted as long as it is in Draft status. It is good to do this to keep the system clear of unneeded forms. Forms in a status other than Draft **cannot** be deleted by a PHA user. *If you need a form in a status other than Draft to be deleted, please submit a request **by email** using the Information in the [Technical Assistance](#) section of this document. Provide your PHA code and name, form number (e.g., MTWS Form – 00015), and the reason the file needs to be deleted.*

1. Open the form you wish to delete. *Information on how to open a form can be found in the [Accessing an Existing MTW Supplement Form](#) section of this document.*
2. In the upper right-hand corner of the form, you will see a button labeled Delete Request. Click on this button to initiate the deletion request.



The screenshot shows the 'MTWS Form Submission' interface for 'MTWS Form - 00106'. In the top right corner, there are three buttons: 'Generate PDF', 'Clone Request', and 'Delete Request'. The 'Delete Request' button is highlighted with a red rectangle. Below the buttons, there is a progress bar with stages: Draft (selected), Submitted, Returned for Revision, Conditional Approval, and Final. A definitions section is visible at the bottom.

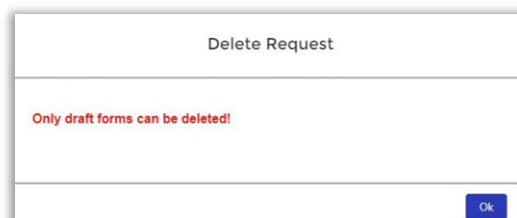
3. A pop-up box will appear and will ask you to confirm that you wish to delete the form. If you do want to delete the form, click on the Submit button in the lower right-hand corner of the pop-up box.



The screenshot shows a 'Delete Request' pop-up box. It contains the text 'Are you sure you want to proceed for delete?' in red. At the bottom right corner, there is a blue 'Submit' button highlighted with a red rectangle.

4. You will be taken back to the page that lists any forms that are visible under the currently selected view (e.g., All).

If the form you have open has a status other than Draft, you will see a message that tells you that you cannot delete this form.



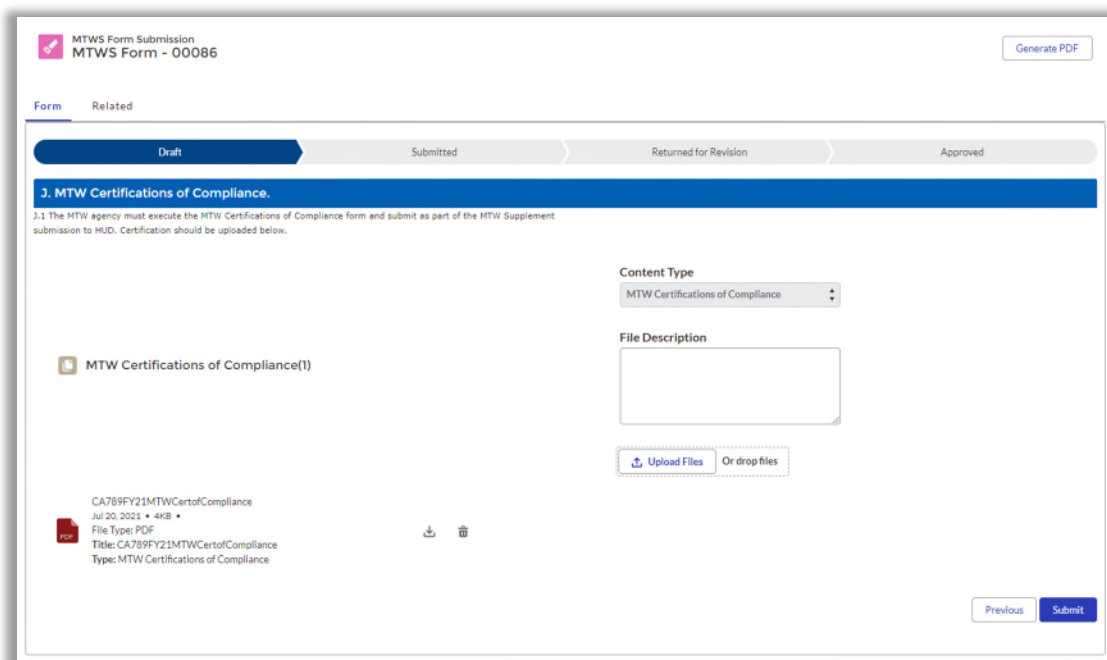
The screenshot shows a 'Delete Request' pop-up box. It contains the text 'Only draft forms can be deleted!' in red. At the bottom right corner, there is a blue 'Ok' button highlighted with a red rectangle.

## Submitting the MTW Supplement

When you have completed entering all data into the form, you can submit it to HUD for review. Once a form is submitted, you will not be able to make any changes and if you open the form, it will be read only. If HUD notifies you that a form needs revisions, they will set the status to Returned for Revision, at which point you will be able to make modifications again.

**Please ensure that you want to submit your form before following these steps. You cannot undo this once this process is completed.**

1. Navigate through the MTW Supplement form using the Next button until you reach Section J, MTW Certifications of Compliance, page.
2. If you have not already, upload your MTW Certifications of Compliance. *This can be found within the [MTW Supplement to the Annual PHA Plan](#). Information on how to upload files can be found in the [Upload a New Document](#) section of this document.*



3. Click on the Submit button in the lower right-hand corner of the page.
4. A pop-up message will appear either at the top (Google Chrome) or elsewhere on the screen that asks you to confirm that you want to submit the form. If you are sure you want to submit, click the OK button. You, as the user that submitted the form, will receive an automatic email notification that your form was submitted. Your local field office and the MTW office will also be copied on this notification.

## Revising a MTW Supplement Form that's Not Approved

To revise the contents of an MTW Supplement form, it must have a status of Draft or Returned for Revision. The status of Returned for Revision is given to a form if HUD is requesting corrections/revisions to a form. If a form is not in one of these two statuses, it will be in read only and will not be editable. The information below will guide you on how to make the most common types of revisions.

### Revise an Uploaded Document

If you need to revise a file that you have attached to your form or if HUD has requested a revision to a file that was uploaded (i.e., correct the content of an uploaded file), you will need to do two things to complete this process. **It is important to do both things in the order stated so that only the correct version of each file is in the system and that there are not multiple copies of a file.**

1. Delete the old version of the form from where it was uploaded in the form. Use the steps for Method 1 in the [Delete an Existing File](#) section to complete this. *Note, you should not use Method 2 unless you previously uploaded the file as other information that is not associated with one of the questions in the form that asks for a file upload.*
2. Upload the updated document to the place in the form where it belongs (e.g., hardship policy). Follow the instructions under "Upload a New Document" in the [Uploading Files](#) section to upload the revised file.

### Remove a Previously Selected Activity

If you need to remove an activity that was previously selected in the Section C screener (e.g., you selected an option other than Not Currently Implemented from the picklist for an activity), you must follow the steps below to remove any files you attached as part of the responses to that activity before you can remove the activity from the form.

**Note:** If you are not already in the form, follow the instructions in the [Accessing an Existing MTW Supplement Form](#) section to open the form.

**If you did not attach any files in the core questions or custom questions for the activity you wish to remove, you can skip to step 5. This section of the instructions is where the activity is removed is what will remove the text and picklist responses.**

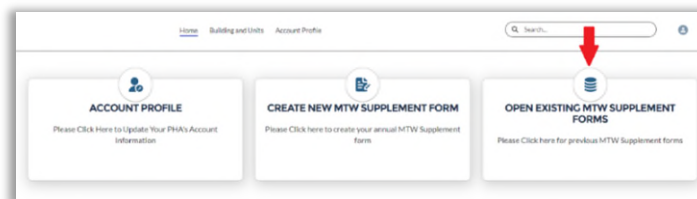
1. If you attached files as part of your responses to an activity, you must navigate through the form until you reach the activity that you want to remove so that the attached files can be removed. When you are on the page for the activity, find the area where you attached the file(s). Below the Upload Files button and to the left, you will see the file you previously uploaded. To delete the file, click on the trash can icon. You will get a pop-up message that asks you to confirm that



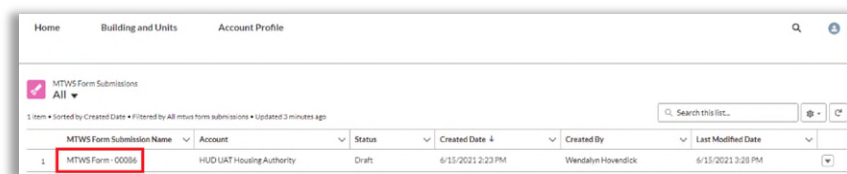
you want to delete the file. Click OK to confirm. The page will refresh, and you will no longer see the file.



- Repeat step 1 if there are additional files within the core questions or custom questions for this activity that need to be deleted.  
**Note:** If you are removing more than one activity, you'll do these steps for each activity you wish to remove uploaded files for.
- If you are removing an activity **and it is the only activity** that you were going to submit a Safe Harbor Waiver (SHW) for in Section D, continue navigating through the form until you reach Section D. **First**, delete the file you uploaded. **Only after you have deleted the uploaded file**, modify your response to reflect that you are not asking for approval for a Safe Harbor Waiver.
- Click on the Home link at the very top of the page. This will take you back to the home page (community portal page).
- On the home page, click on the tile labeled Open Existing MTW Supplement Forms.



- On the Previous Supplement Submissions page, look for the form number associated with the form you wish to open under the MTWS Form Submission Name column and click on it to open it.



MTWS Form Submission Name	Account	Status	Created Date	Created By	Last Modified Date
1 MTWS Form - 00594	HUD UAT Housing Authority	Draft	6/15/2021 2:23 PM	Wendalyn Hovendick	6/15/2021 3:28 PM

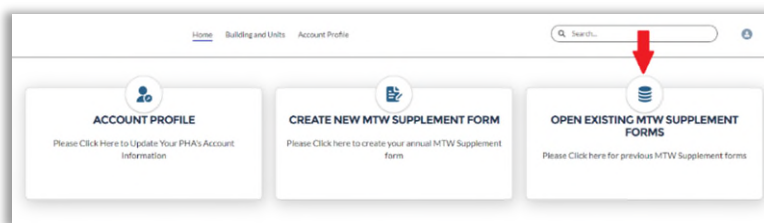
- Navigate to the first page of Section C, which is the Section C screener. Find the activity or activities you wish to remove and from the picklist select Not Currently Implemented. This will remove the text and picklist responses you entered for the core questions and custom questions.

## Amending an Approved Form

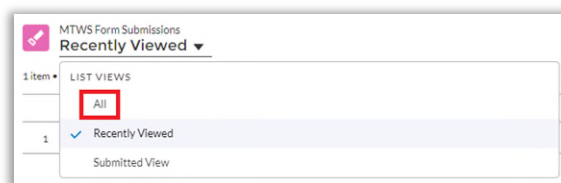
If your MTW Supplement for a specific Fiscal Year Beginning (FYB) has been approved – meaning it has a status of Final in the system – and you need to submit an amended annual submission, you can use the steps below to clone your approved (final) annual submission. This will create a copy of your approved form that contains all the responses and file attachments so that you will only have to update the areas that you need to amend.

**Note:** The steps below, including use of the “Clone Request” button are **only** to be used for creating an amended form. It is not to be used for any other reason.

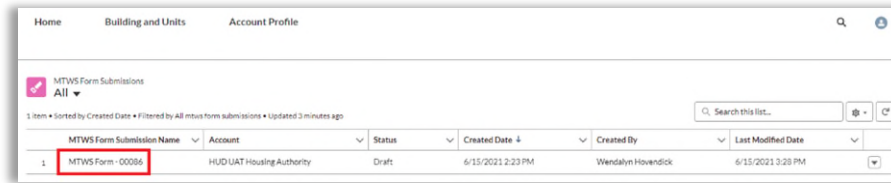
1. If you are not already logged into the system, login by going to <https://hud.my.site.com/hip> and entering your user ID and password.
2. On the home page, click on the tile labeled Open Existing MTW Supplement Forms. *The tiles that you see on this page will be dependent on the areas of the Housing Information Portal (HIP), which includes the MTW Supplement, that you have access to.*



3. On the Previous Supplement Submissions page, look for the form number associated with the approved form you want to amend. It will have a status of Final and should say the year of the FYB for the form you want to amend. Click on the form number under the MTWS Form Submission Name column to open it.
  - If you do not see any forms listed or do not see the one you are looking for, under the MTWS Form Submissions heading click on the arrow to the right of the words Recently Viewed to open a drop-down box and select the All option.



The All view is what will show you the status, Created Date, Created By, and Last Modified Date columns that will also assist in determining the form you wish to open.



Home Building and Units Account Profile

MTWS Form Submissions  
All ▼

1 item • Sorted by Created Date • Filtered by All mtws form submissions • Updated 3 minutes ago

Search this list...

	MTWS Form Submission Name	Account	Status	Created Date	Created By	Last Modified Date
1	MTWS Form - 00160	HUD/UDAT Housing Authority	Draft	6/15/2021 2:23 PM	Wendalyn Hovendick	6/15/2021 3:28 PM

4. Once the form opens, find the Clone Request button on the right side of the page.



MTWS Form Submission  
MTWS Form - 00160

Generate PDF Clone Request Delete Request

Form Related

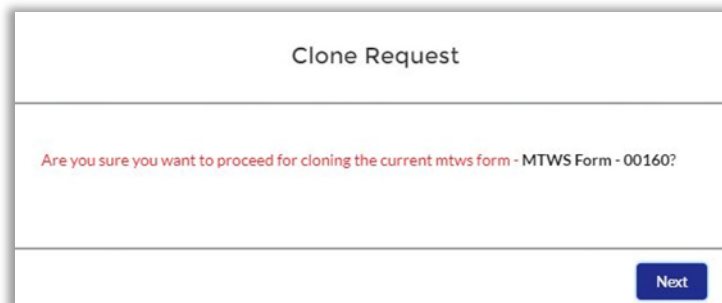
Draft Submitted Returned for Revision Conditional Approval Final

Definitions. All terms used in this MTWS Supplement are consistent with the definitions stated in the MTW Operations Notice, including:

1. Local, Non-Traditional Activities (LNT) - Those MTW activities that use MTW funding flexibility outside of the Housing Choice Voucher (HCV) and public housing programs established in Sections 8 and 9 of the U.S. Housing

5. You will see a pop-up box that asks you if you are sure you want to clone the form. Click on the Next button to proceed.

**Note:** If you are in a form that does not have a status of Final, you will receive a message that tells you that you cannot clone a form that does not have a status of Final.



Clone Request

Are you sure you want to proceed for cloning the current mtws form - MTWS Form - 00160?

Next

6. Once the clone request has been submitted successfully, you will receive a message telling you the request was successful. Click on the Go to Cloned Record button in the pop-up box to go to the newly created form. **The new form will have a status of Draft.**

### Clone Request

---

Congratulations!

New cloned record is generated successfully. Please click next to navigate!

---

[Go to cloned record](#)

7. The new form will open. Keep the following in mind as you amend your approved form:
  - In Section A:
    1. Do **not** change the “Year for Supplement Fiscal Year Beginning” field! It must remain the same as the approved form or this will not be considered an amendment.
    2. You **must** choose Amended Annual Submission in the “MTW Supplement Submission Type” picklist.
  - In other sections of the form:
    1. **Only modify the responses that need to be modified for the amendment.** Leave all other responses as they were in the approved form for this Fiscal Year Beginning (FYB).
    2. Leave all file attachments that were carried forward to the amendment as they are. If you need to modify a file attachment due to the amendment,
8. Once you have made the necessary modifications for your amended form for the specified FYB, you can submit the form using the Submit button in Section J.

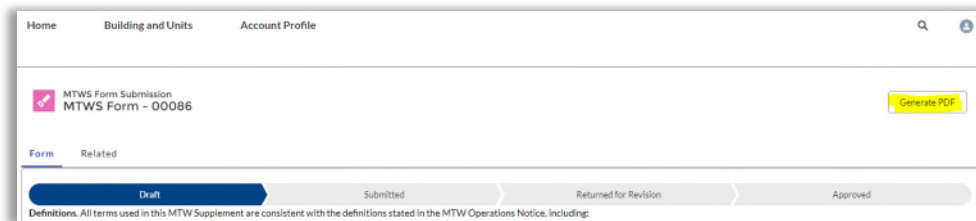
## Downloading a PDF of the Form

There are a few uses for the PDF generation feature in the HIP MTW Supplement module. The PDF file does not contain any of the files you have uploaded to the system. If you are using the PDF for a hearing or for your official records, please ensure that you include copies of any files you have uploaded that contain supporting documentation.

- To view a copy of the information you have entered in the form without navigating through the form on the screen.
- To download and print a copy of what you have entered for a public hearing.
- To download and print the approved version of the MTW Supplement for your files.

**Note:** If you have just created the form in the current login session, you will need to navigate to the home page using the Home button in the upper left-hand corner and then open the form again using the [Accessing an Existing MTW Supplement Form](#) section of this document. You will also use this section if you are not already in the form you wish to generate a PDF of.

1. On the MTWS Form Submission page, click on the Generate PDF button in middle of the of the screen toward the top of the page.

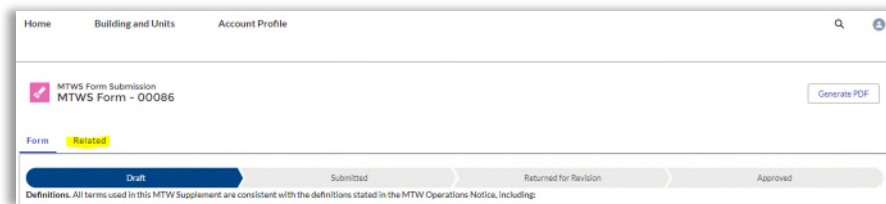


2. A box will be displayed over top of the MTWS Form Submission page (you will still see the page in the background) that states the job has been submitted to generate the PDF. Click on the Finish button to go back to the MTWS Form Submission page.

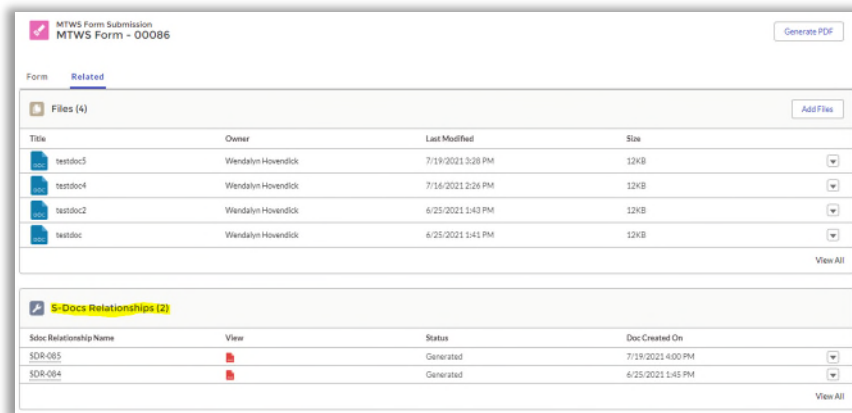


3. You must wait a few minutes to let the system finish generating the PDF file before you continue with these instructions. *This is especially important for forms that contain many waivers and activities.*

4. Back on the MTWS Form Submission page, on the left side of the page above the line that shows the status of the form, look for the tab (link) labeled Related and click on it.







5. Scroll down the MTWS Form Submission page until you see the “S-Docs Relationships” heading. A number representing the number of generated PDFs will also appear in parenthesis next to this heading. The first file will be the one you requested.
  - If date and time under the “Doc Created On” column does not say the current date and a time near the current time, it may be that the form has several waivers and activities selected in Section C. **Do not use your Refresh button to refresh the page; it may result in an error or being logged out.** Click on the Related tab at the top of the page to refresh the page.



6. Click on the red PDF icon in the View column to open the PDF in a new tab of your browser.
  - If your form has several waivers and activities selected in Section C and you did not wait a few minutes before continuing, when you open the file, you may only see a partial file (not all the sections will be included). Close the file and wait a few minutes to let the system complete the process. You do not need to navigate away from the page. After a few minutes, click on the PDF icon again and the full form should populate in the PDF file.
  - If you see a message that says “unique error” you may have opened the PDF file too soon after generating it. Close the tab and wait a few more minutes before opening the file again.

- If you clicked on the file name under the “Sdoc Relationship Name” column and it took you to another page, this same icon is also on that page and will work in the same way. To leave this page, use the Home button at the top of the page not your browser’s Back button.

S-Docs Relationships (2)				
Sdoc Relationship Name	View	Status	Doc Created On	
SDR-085		Generated	7/19/2021 4:00 PM	
SDR-084		Generated	6/25/2021 1:45 PM	
View All				

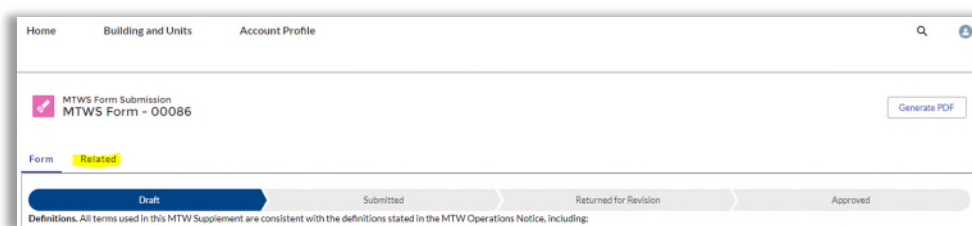
7. While viewing the PDF you can save the file or print it as you normally would.

## Downloading Uploaded Files

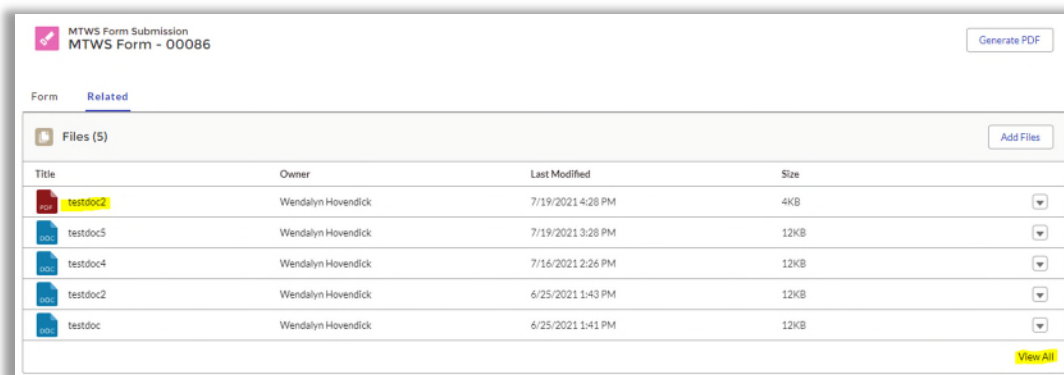
If you need to download a copy of a file you previously uploaded to the system, you can use the following steps.

*If you are not already in the form, use the instructions in the [Accessing an Existing MTW Supplement Form](#) section of this document to open the form you wish to download files from.*

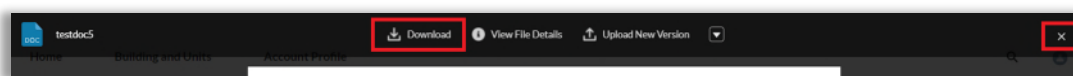
1. On the MTWS Form Submission page, on the left side of the page above the line that shows the status of the form, look for the tab (link) labeled Related and click on it.



2. The first section on the MTWS Form Submission page is the Files heading. Next to the heading will be a number in parenthesis to tell you how many files have been uploaded to the system.
3. To download a file, start by clicking on the file name.



4. You will see a preview of the file's contents over top of the MTWS Form Submission page. Click on the Download button at the top in the top middle of the screen to download the file.



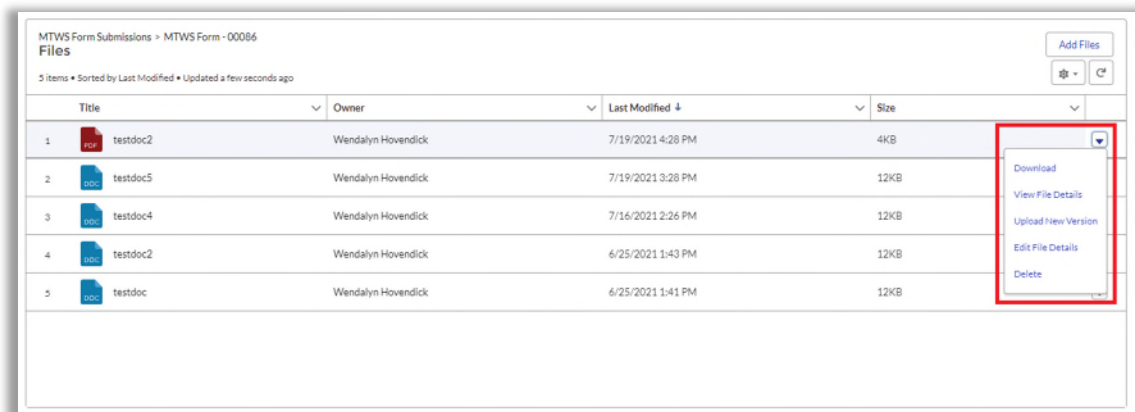
5. Select the location you want to save the file to and click on the Save button.
6. Use the X in the upper right corner of the preview – not your web browser – to close it and go back to the file listing.



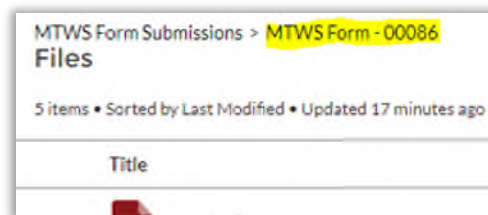
7. Repeat the process to download additional files.

If all the files are not displayed under the “Files” heading, you can get to them by clicking on the View All link below the last file. To download files from the Files page, use the following steps.

1. On the Files page, you can click the file name and then proceed with steps 3-7 above. Alternatively, you can click the on down arrow on the right side of the line for that file and a menu will appear. Click on the Download option.



2. A Save As dialogue box will appear. The file name that appears is the file name that you originally uploaded the file with. Select the location you want to save the file to and click on the Save button.
3. You will be taken back to the Files page. Navigate back to the MTWS Form Submission page using the link to the form in the upper left corner above the Files heading.



## Technical Assistance

If a PHA user requires assistance in addition to what is provided in this document, they should contact the REAC Technical Assistance Center (TAC) using the information below.

- By phone: 888-245-4860, option 9 **OR** by email: [REAC\\_TAC@hud.gov](mailto:REAC_TAC@hud.gov)
- Email is preferred if you need to document a possible issue not covered in this document or the “known issues list”. See below for what to include in your email.

## General Tips for Getting Assistance

- When requesting assistance, state that it is for the HIP MTW Supplement module. **Do not mention Salesforce.**
- If calling, **ensure you get the name of who you are talking to** in case you have an issue getting assistance. This will allow someone to get that information from you and follow up with the REAC TAC.
- If you are having an issue with a form, be prepared to provide the form number so it can be documented in the ticket.

## What to Include in Email Requests

When emailing the REAC TAC, at a minimum you must include the following. This information will help us know exactly what the issue is and replicate it, if needed.

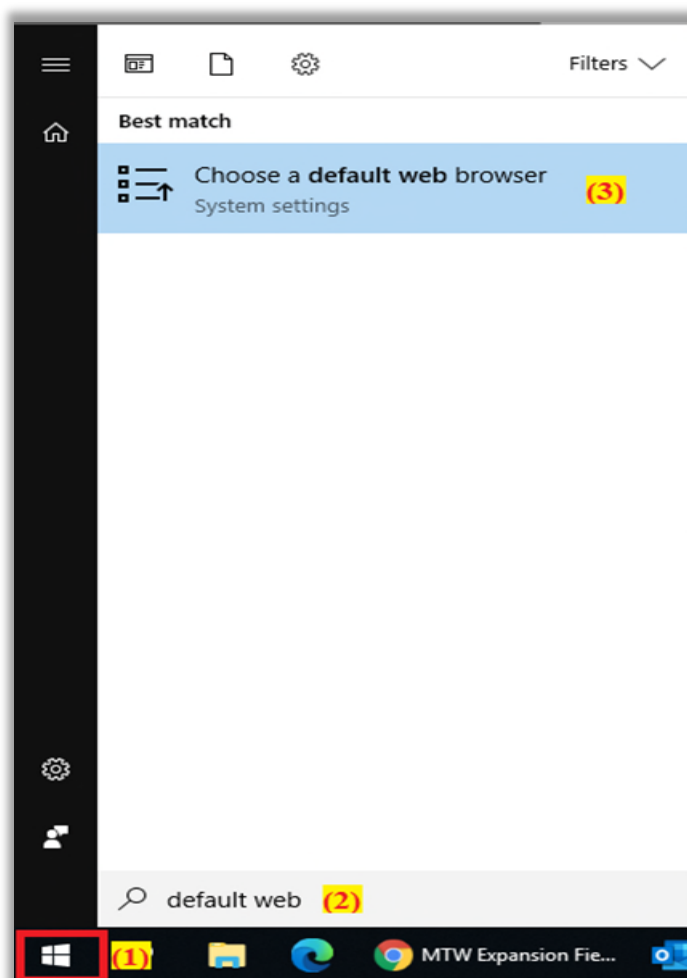
- Include “HIP MTW Supplement module” in the subject line. You can include other text, but the body of the message is what should provide the actual details of the issue.
- Include your name and PHA code. Assistance requests are connected to both the user and PHA.
- For issues with your password, state whether you have attempted to reset it using the password reset link.
- What action were you trying to do in the system?
- What steps you took right before the issue occurred?
- If you are having an issue with a form, provide the form number.
- If you received an error message and/or a visual would assist in demonstrating the issue, provide screen prints documenting what you saw that is contrary to what you should be seeing per the instructions provided in this document or the “Getting Started with the MTW Supplement Module” knowledge article on the [HIP Training page](#).

## Appendix: Checking your Default Web Browser

As mentioned in the [Accessing the System](#) section of this document, you must use a web browser other than Internet Explorer (IE) to perform all actions in the HIP MTW Supplement module. Google Chrome, Microsoft Edge (current version, not legacy), and Safari are known to work. Furthermore, your default browser is what is used to open clicks that you click on in documents and emails. So, if you use IE for any account related emails or to login to the system, the process will fail.

If you are unsure which browser is setup in Windows as your default, follow steps 1 and 2 below. If you would like to change your default browser (e.g., if you find that the default is currently Internet Explorer), follow all four steps. You aren't required to change your default browser, but if you don't it will be imperative that you always keep in mind which browser is your default.

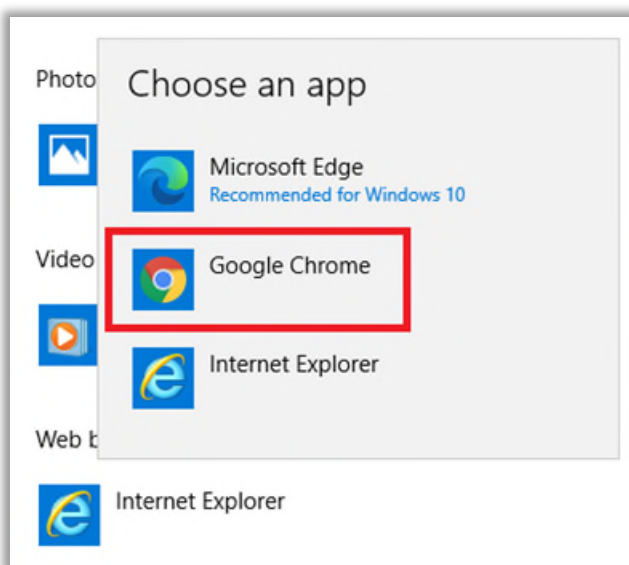
1. Click on the Start menu (1) and without navigating to anything type "default web" (2). You will see a search result that says, "Choose a default web browser" (3), click on it to open it.



2. In the window that opens, look for the “Web browser” heading. This will show you what your current default is. *If it already says Google Chrome, Microsoft Edge, or another supported browser, you can stop here.*

**To change your default browser:**

3. Click on where it states what the current default is, and it will expand. Under the words “Choose an app” select Google Chrome or Microsoft Edge (current version, not legacy). *You could also choose another non-IE browser that is supported such as Safari.*



4. You will now see your new selection under the “Web browser” heading. You can close the window. From now on, any links you click on in your email program or other programs will open in the newly chosen default.